

2018-2019 How to Guide: IRS Data Retrieval and IRS Tax Return Transcript

Data is available within **2-3 weeks of electronically filing your taxes** or **6-8 weeks of filing a paper tax return**. These instructions assume you have already completed your **2018-2019 FAFSA**.



Skip ahead to Section 2 if:

- You have filed an extension
- You are married filing separately
- You or your parents have had a marital status change since January 1, 2018
- You have filed an Amended Return

Section 1: How to use the IRS Data Retrieval Tool? *(Linking your FAFSA with the IRS)*

Step 1: Go to <https://fafsa.ed.gov> and click "Login"



The screenshot shows the FAFSA website homepage. At the top, it says "Federal Student Aid" with the tagline "PROUD SPONSOR of the AMERICAN MIND®" and "Free Application for Federal Student Aid". Below this is a navigation bar with icons for Home, About Us, FSA ID, StudentAid.gov, and Help, along with a search bar and language options (English, Español). The main banner reads "Get help paying for college" and "Submit a Free Application for Federal Student Aid (FAFSA)". Below the banner are two columns: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of options (Make a correction, Add a school, View your Student Aid Report (SAR), and more...) and a "Login" button. The "Login" button is highlighted with a red border.

Step 2: Enter your FSA ID Username or Verified E-mail Address > Enter your FSA ID Password > Click **NEXT** OR Enter the student's information and enter the requested student's demographic information into each field > Click **NEXT** (*The FSA ID and FSA ID Password should have been created when you completed the initial FAFSA.*)

Step 3: Click "Make FAFSA Corrections" for 2018-2019.

Step 4: Create a Save Key and click **NEXT** (You must create a save key. The save key allows you to return to an application or correction later if you need to stop and save your work.)

Home Help SEARCH

Make Corrections to Your 2018-2019 FAFSA

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2017

Create a Save Key.
The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

NEXT

NEED HELP? MY FAFSA

Help and Hints

Create a Save Key

You must create a save key. The save key allows you to return to an application or correction later if you need to stop and save your work. It also allows you to share access to your application or correction if your parent needs to add information or sign.

The save key must be between 4 and 8 characters long. You can use any combination of numbers and / or uppercase and lowercase letters. For example, the save key "Student2" is different than the save key "sTuDeNt2."

Try to choose a save key that you can remember but that would be hard for

Step 5: Click on the "Financial Information" tab to use the Data Retrieval tool > Click **NEXT**

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information**

Introduction Page - 2018-2019 FAFSA

Use the **Next** and **Previous** buttons to move from page to page in the form. If you use your browser's back and forward buttons to move from page to page, you may lose your data.

Additional information about *FAFSA on the Web*:

- [How can I get help completing my FAFSA?](#)
- [How many steps does it take to complete?](#)
- [How long will it take to complete?](#)
- [Can I save my FAFSA if I can't finish it?](#)
- [Documents needed to complete the FAFSA](#)
- [Signing the FAFSA](#)
- [FAFSA on the Web Security and Privacy](#)

NEXT

EXIT

Step 6: Select “Already Completed” for the tax return filing status > Answer the eligibility questions > If you are eligible to transfer your information from the IRS into your FAFSA, Click “**LINK TO IRS**” > Enter your FSA ID Username or Verified E-mail > Enter your FSA ID Password. **If you are ineligible to transfer your information from the IRS into your FAFSA, please proceed to Section 2.**

STUDENT

Student Demographics School Selection **Dependency Status** Parent Demographics Financial Information

Student Tax Information

i • Attention! You must provide financial information from your 2016 tax return on the following pages.

✓ • Application was successfully saved.

For 2016, have you completed your IRS income tax return or another tax return?
Already completed

For 2016, what is your tax filing status according to your tax return?
Single

Did you file a Puerto Rican or foreign tax return for 2016?
 Yes No

⚙ Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

LINK TO IRS

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Step 7: Click **OK** to leave the FAFSA website and enter the IRS Data Retrieval Tool website.

Help

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

Leaving FAFSA on the Web

You are now leaving FAFSA on the Web and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your FAFSA on the Web session will end.

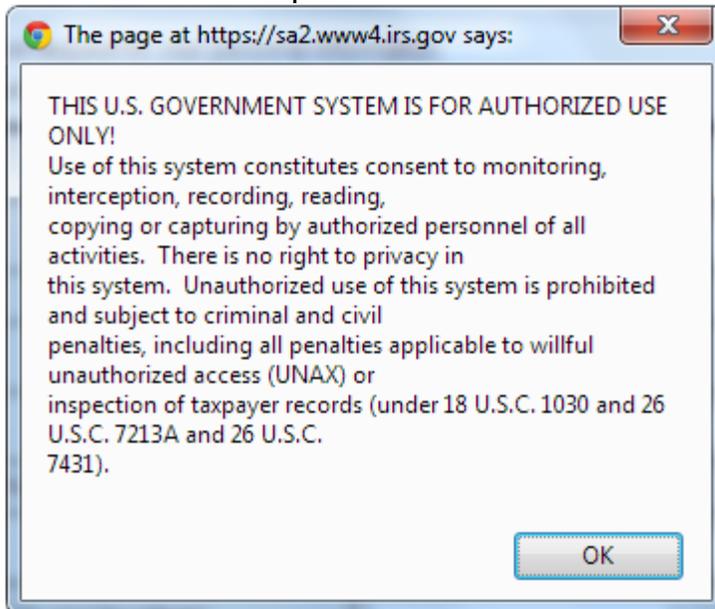
Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL OK

Step 8: Click **OK** to accept the IRS Data Retrieval Tool terms of use.



Step 9: Enter the requested information and click "Submit." Remember to enter your Name, Date of Birth, Filing Status and Address exactly as it appeared when you filed your taxes.

 [Return to FAFSA](#) | [Log Out](#) | [Help](#) [Español](#)

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2016 Federal Income Tax Return. Required fields *

First Name *	GDIT
Last Name *	DATA
Social Security Number *	*** - ** - 2618
Date of Birth *	01 / 01 / 1999
Filing Status * ?	Single <input type="text"/>
Address - Must match your 2016 Federal Income Tax Return. ?	
Street Address *	4050 ALPHA RD TEST
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	FARMERS BRANCH
State/U.S. Territory *	Texas (TX) <input type="text"/>
ZIP Code *	75244

Select the button below to exit the IRS system and return to your FAFSA. By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

Step 10: Review the information that the IRS has retrieved from your tax returns. Check the box to **“Transfer My Tax Information into the FAFSA”** and click **“Transfer Now.”** Your IRS data will be transferred to your FAFSA and you will be returned to the FAFSA website.

Return to FAFSA | Log Out | Help

IRS.gov Español

2016 Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Pensions
Name(s)	Adjusted Gross Income	Untaxed IRA Distributions
Social Security Number	Income Earned from Work	Tax exempt Interest Income
Filing Status	Income Tax	IRA Deductions and Payments
IRS Exemptions	Education Credits	Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA

The tax information provided to FOTW will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. **Transfer Now**

Do Not Transfer My Tax Information and Return to the FAFSA

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. **Do Not Transfer**

[IRS Privacy Policy](#)

Step 11: Answer the additional questions and click **NEXT**.

STUDENT

Student Demographics School Selection **Dependency Status** Parent Demographics Financial Information

Student Financial Information

i • You have successfully transferred your 2016 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with “Transferred from the IRS.” For your protection, IRS tax return information is not displayed on the FAFSA.

What income tax return did you file for 2016?
Transferred from the IRS

What was your adjusted gross income for 2016?
Transferred from the IRS

How much did you earn from working (wages, salaries, tips, etc.) in 2016?
Transferred from the IRS

Did you file an IRS Schedule K-1 (Form 1065) for 2016?
 Yes No

As of today, are you a dislocated worker?

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

NOTE: If you are using the IRS Data Retrieval Tool for both the student and parent, you will have to complete this process twice, once under the Student Financial Information Section and once under the Parent Financial Information section before submitting the FAFSA

Step 12: Continue to the “**Sign & Submit**” tab. Follow all of the instructions carefully. Once you complete all required fields, click “**SUBMIT MY FAFSA NOW.**” You’re done!

Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number
XXX-XX-XXXX

Mother's/Stepmother's last name
XXXXXX

Mother's/Stepmother's date of birth
XX/XX/XXXX

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

1. to provide information that will verify the accuracy of your completed form
2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.

Agree Disagree

What is your (the Mother's/Stepmother's) FSA ID?

FSA ID Username or Verified E-mail Address
Create an FSA ID
Forgot Username

FSA ID Password
Forgot Password

SIGN

Student Signature - Sign With an FSA ID

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education.
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it.
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.

Agree Disagree

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address
Create an FSA ID

FSA ID Password

SIGN

[PREVIOUS](#) **SUBMIT MY FAFSA NOW**

Help and Hints

Terms of Agreement - Parent

In order to submit your FAFSA, your parent must review the Terms of Agreement and select **Agree**.

[More >>](#)

NOTES: If parent information was updated during the Data Retrieval Process, your parent must review the Terms of agreement and select **Agree**. Also, remember to print or save the confirmation page for your records.

Check your [MyMTC](#) email account on a regular basis for correspondence from the MTC Student Financial Services Office.

Section 2: How to obtain a Tax Return Transcript from the IRS online or through mail if I am not eligible to use the Data Retrieval Tool.

- Due to changes made in 2012 by the Department of Education, the MTC Student financial Services Office is **unable to use personal copies of your Tax Return** for Verification for the **2018-2019** academic year.

Step 1: Student/Parent go to www.IRS.gov and click “**Get My Tax Record**”

The image shows the IRS website homepage. At the top left is the IRS logo. To the right of the logo are links for 'Help', 'News', and 'Language'. Further right are two buttons: 'Charities & Nonprofits' and 'Tax Pros'. Below these is a navigation bar with tabs for 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions'. The main content area features a grid of service tiles. The tile for 'Get My Tax Record' is highlighted with a red rectangular border. Other tiles include 'Pay My Tax Bill', 'Get My Refund Status', 'Free File', 'Filing Information', 'Apply For an Employer ID Number (EIN)', 'Get Answers to Tax Questions', and 'Individual Taxpayer ID Number (ITIN)'. The background of the main content area features a stylized American flag.

Step 2: To receive your Tax Return Transcript **ONLINE**, click

Get Transcript Online

To receive your Tax Return Transcript through **MAIL**, click

Get Transcript by Mail

Get Transcript Online

Get Transcript by Mail

What You Need

To register and use this service, you need:

- your [SSN](#), date of birth, filing status and mailing address from latest tax return,
- access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- All [transcript types](#) are available online
- View, print or download your transcript
- Username and password to return later

What You Need

To use this service, you need your:

- [SSN](#) or [Individual Tax Identification Number \(ITIN\)](#),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Return or Account [transcript types](#) delivered by mail
- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

Step 3: If you do not have an account, click [CREATE ACCOUNT >](#). If you have an account, enter your username and click [LOG IN >](#). If you have an account, but do not know your username, click [Forgot Username](#).



Sign Up

Don't have an account? Create one now.

[CREATE ACCOUNT >](#)

Log In

Already have a username? Welcome back!

Username

[LOG IN >](#)

[Forgot Username](#)

PTIN and FIRE users need a separate account in this system

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

IMPORTANT: You will need **all** of the following information and materials to complete your registration with the IRS.

- Full Name
- Email
- Birthday
- Social Security Number (SSN) or Identification Number (ITIN)
- Tax filing status
- Current Address

You will need one of the below financial accounts to verify your identity. You will not be charged any money and are not sharing any account balances or other financial information with the IRS.

- Credit Card **OR**
- Mortgage or Home Equity Loan **OR**
- Home Equity Line of Credit **OR**
- Auto Loan

You will need to have your US-base mobile phone with your name associated to the mobile phone account with you to verify your phone number today. This service will not work on Pay-As-You-Go (Prepaid) plans, landlines, Skype, Google Voice, or similar virtual phones.



You may also call to request an IRS Tax Return Transcript by dialing:
1-800-908-9946.

Please submit your requested IRS Tax Return Transcript to the MTC Student Financial Services Office as soon as possible to expedite processing.

IMPORTANT: If you are married and filed a **joint tax return** with your spouse, tax account data is listed under the social security number of the primary taxpayer (the name and social security number listed first on the tax return) shown on your tax return.

If you have filed an **extension** and have not filed your 2016 taxes, we need your Form 4868, Request for an Extension and your 2016 W2s (if self-employed, you must provide a signed statement estimating your Adjusted Gross Income (AGI) and income taxes paid for 2016). We can process your Verification using the estimated numbers **BUT** once your taxes have been filed, you will need to submit copies of your IRS Tax Return Transcript to the Student Financial Services Office. Your financial aid awards may change to reflect the actual numbers on the transcript.

If you have filed an **Amended Tax Return**, you are required to submit your signed 1040X form. You cannot use the online Data Retrieval Tool.